

User Interview + Survey

In a nutshell

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Interviews

What is User Interview?



- 1 on 1 conversation
- Variety of participants
- Structured/ Semi-Structured/ Unstructured
- Can be in person or remote

When to use User Interviews?



Best for: Getting qualitative data

- Reveal existed mental models and insight
- Understand the meaning behind the behaviors
- Identify new opportunities

Not for: Getting quantitative data

- Predicting future behavior

Why use User Interviews?



- Favor depth over sample size
- About learning from users and asking questions
- Is very powerful combining with other methods (eg. identifying key themes and validate them quantitatively using survey)
- Increase empathy

5 Steps of Conducting User Interviews



Define

Prepare

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Work

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**After this stage,
you should have:**

- ☐ Project background
- ☐ Research goals
- ☐ Existing resources
- ☐ Assumptions & beliefs
- ☐ A list of questions that can be answer by interviews
- ☐ A list of topics with different priority

- Meet with stakeholders to clarify business and research objectives
- Collect and clarify specific questions the research should answer
- **Verify if interview is the right approach for which question(s)**
- Review and document related materials (Previous research reports, existing products, in development prototypes)
- Collect current beliefs and assumptions about users
- Clarify the limitation, uncertainties, and the potential biases of any research methods or during the research process

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**After this stage,
you should have:**

- ☐ Scripts/Protocol for your interview
- ☐ Participants recruited and scheduled
- ☐ Incentives ready to gift
- ☐ Platform and devices setted up

Recruit right participants:

- Define key characteristics for your sample
- Use a screener or questionnaire to find potential participants that qualify
- Recruiting
- Scheduling

Plan the interview:

- Set up platform and devices
- Interview guide/ protocol
- Pilot test your script and questions

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Just one sec...

Before starting each interview:



- State your objectives again
- Leave the company logo clothing at home
- Set aside your expectations and strong views
- Open up your ears and mind
- Be fully curious about what the user have to say
- Check recording platform setting



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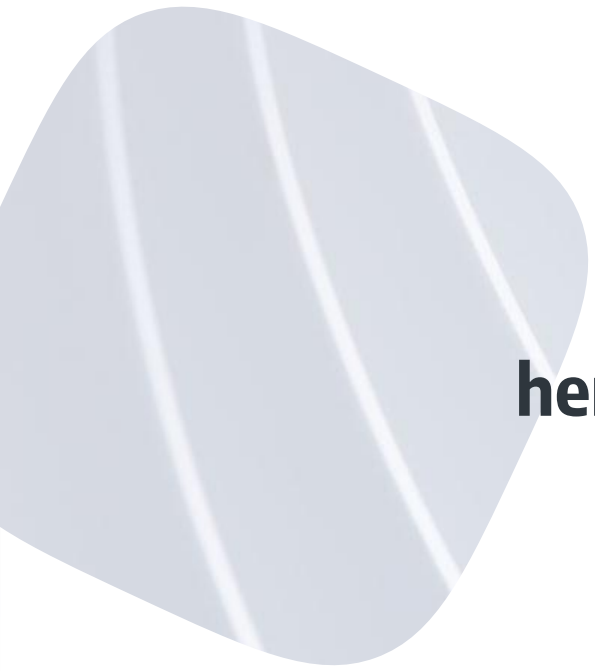
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Interview start:

- Give consent form and get signature
- Confirm timing
- Explain who we are and why we are doing this
- There is no right or wrong answers
- Chit chat to build rapport
- Start by asking simple broad questions to set some context



To interview well...
here are some best practices:



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Asking Questions in the Right Way

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Neutral & Non leading

- **Ask open ended questions:**

- ☐ Do you like memes /Do you not like memes?
- ☒ What do you think of memes?

- **Don't make it a pass/fail question:**

- ☐ Do you know what a USB cable is?
- ☒ Do you have experience using a USB cable?

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1

Showing & Telling

-  What is your process for updating your meme list?
-  Can you show us how you would update your meme list?
 - Explain to an outsider
 - Teach another
 - Make comparison

Exercise: “How do you prepare a coffee?”



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Ask probing question

1. Clarification
2. Code word/ native language
3. Emotional change
4. Understand why

Probe delicately! Probe without presuming!



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Manage the Interaction

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2

My participant won't talk!

Try to identify the cause and make change

- If the interview participant need more structure: Ask easy questions, keep inquiring factual, straightforward and simple questions
- If too many interviewers, ask them to step back
- If participants don't have enough verbal space, slow down and let them talk



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Help! My participant won't stop talking!

- Ask yourself is this really is a problem
- Redirect them back to your question
- Redirect to the initial topic at appropriate time
- If must interrupt, frame it properly



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2

Embracing your participants worldview

- Don't correct any wrongs, use them
- Acknowledging participants' language before using it directly if it is some terminology the participants use in their own group (eg. Pacesetter in China)
- When using abbreviation, state it so the switch of the name won't cause any confusion
- If you have to fix something, wait till the end



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2

Yay! The participant is asking me a question!

- DO NOT answer
- Turn the question back: “Is this important to you?” “What would you expect it to be?”

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2

Manage the flow

- Signal your lane change when change the area of discussion
- Is the participant understanding the questions?
- Are you asking the question in a way they can answer?
- Redirect to the initial topic at appropriate time



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2

Manage the flow

If more questions come up during the interview process: Keep track of the questions

1. Wait until the questions come up again in the conversation
2. Prioritize base on your research objectives
3. Prioritize base on what makes the best follow up



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The Art of Silence

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Awkward silence (or Insightful silence?)

- After ask a question, be silent
- After participant response, be silent (for a bit)
- “Skype effect” Slow Down!

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WAIT



memegenerator.net

Wrapping up the interview

- “Doorknob Phenomenon”: crucial info is revealed just as the patient is about to depart.
- If want follow up interviews, make explicit request.
- Incentives

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After interview

Data processing, Send out incentives





Surveys

What is A Survey?



Questionnaire

The set of questions that you will put to the people you want to answer them

Survey

A process of asking questions that are answered by a sample of a defined groups of people to get numbers that you can use to make decisions

Approach

Is this the right method to answer my questions?

People

Am I talking to the right users?

Question

Am I asking the right question?



Why use A Survey?



- Bigger sample size
- Quantify insights
- Is very powerful combining with other methods (eg. generalize findings or insights gathered from qualitative methods)

When to use A Survey?



Best for: Getting quantitative data

- Obtain a number that describe your defined group of people
- Benchmark
- Modeling

Not for: Getting qualitative data

- Understand the meaning and reasons behind behaviors

5 Steps of Conducting Surveys





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**After this stage,
you should have:**

- ☐ Project background
- ☐ Research goals
- ☐ Existing resources
- ☐ Assumptions & beliefs
- ☐ A list of answers that can be answer by surveys
- ☐ Most Crucial Question (MCQ)

- Meet with stakeholders to clarify business and research objectives
- Collect and clarify specific questions the research should answer
- Verify if survey is the right approach for which question(s)
- Review and document related materials (Previous research reports, existing products, in development prototypes)
- Collect current beliefs about users
- Clarify the limitation, uncertainties, and the potential biases of any research methods or during the research process



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**After this stage,
you should have:**

- ☐ A tested questionnaire that can be understood and answer easily by people
- ☐ A defined group of people you would like to have the answers from
- ☐ The number of responses you need

Write questions carefully for your questionnaire.

Recruit right participants:

- Define key characteristics for your sample
- The right response is better than a big response

Do a cognitive testing for the questions.



**To ask questions correctly in a survey...
here are some best practices:**

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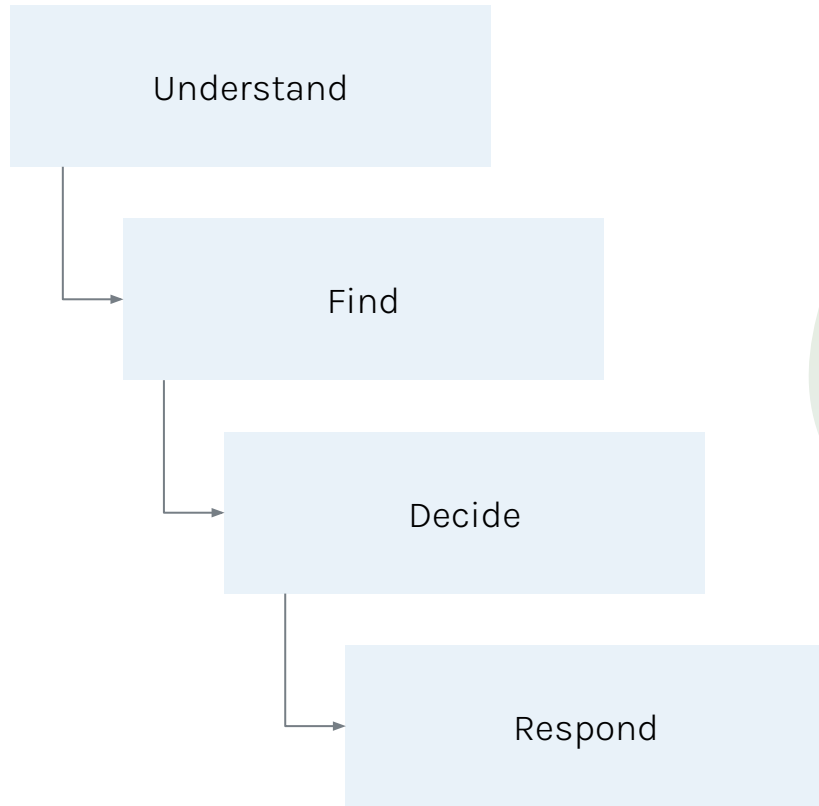
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**Understand how people
respond to a survey**

1



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What makes a good survey question?

2

Good questions are easy to **understand**

- Be aware of the differences between you and your respondents
- Turn the question into something meaningful to your respondents:
 - Keep it simple and short
 - Use familiar words in familiar ways
 - Ask people to focus on one thing at a time (NO double- barreled questions)

Good questions ask for answers that are **easy** to find

- Get answer from memory
 - Get answer from somewhere else
 - Get answer from someone else
 - Create answer at the time you're asked
-
- Ask about recent, vivid experience
 - Recall first, then recognition
 - Avoid asking for predictions of future behavior

Good questions are **comfortable** to answer

- Privacy: The decision is deeply affected by the reasons why you're asking & the concerns of the respondents
- Context effect decision: When a question changes its meaning according to its position in a questionnaire
- Context of the respondents
- Deciding on answer can be painful

Good questions are **easy to responde**

- Use the simplest possible response format
- Do not use drop-downs
- Closed question VS Open questions:
 - People get affected by how options are phrased/presented easily
 - Open questions get more accurate answers, but might take more time to answer
 - Use smaller text input box for open questions

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**Pilot testing makes the
difference**

3

Test your questions in **cognitive interviews** with a few people in your defined group:

- Read the question aloud,
- Explain it back to you in their own words,
- Think out loud to find potential answers,
- Tell me about the choice of which answer to give
- Enter the final response

Starting with 2-3 people per group.

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Other details to consider

4

- Choose your image carefully



(COUPER, CONRAD ET AL., 2007)

- Consider the order of your questions
 - Start with easy, unintrusive topics
 - Start with interesting questions
 - Do NOT have “required questions”



Thanks!

Any questions?